Workflow Training Guide

Basic Workflow concepts:

- Workflow is an automation of a business process. When one step of the process is complete, workflow advances to the next step.
- Workflow has users. Each user has a workflow logon like Banner users.
- Work is distributed by role. Each role is associated with one or more users. All users in a particular role will receive work to do on their worklist. However, only one user will be able to complete the work.
- Workflow responsibilities and privileges are also managed by roles. Users have access to different Workflow functions depending on their roles.
- When you logon to Workflow via UNAPortal, you will see a worklist. The worklist is the work that has been sent to your user ID because of the roles associated with your user id.
- Logging on to workflow via UNAPortal will let you know if you have work to complete.
- Worklists can also be displayed in a UNAPortal channel.

Workflow Terminology

Activity	A step in a workflow
Role	Privilege that is associated with a user logon ID. Roles are associated with users. Roles determine what work each user will see.
Worklist	"To Do"/work items sent to users.
Workitem	Item/work on the worklist that must be completed by a user.

Things you need to know

This document is meant to introduce you to the SunGard Banner Workflow product. This document and these instructions are to be used in conjunction with your business process documents. Business process specifics will be provided in a procedures document by the institution.

This document will provide generic instructions for the following:

- Log on to workflow
- Respond to work

1 Log on to Banner Workflow

Log into Workflow

1. Log into UNAPortal (http://unaportal.una.edu)
2. Click the Workflow tab (or, for experienced users, the Workflow Channels tab).

While logged into Workflow, if you have not accessed Workflow for 20 minutes or more, your session may time out and you will be asked to log in to Workflow again. Simply click on a different tab in UNAPortal, then click on the Workflow tab again. This should log you in again. After you log in, you should be returned to the same point in Workflow.

2 Respond to work

When you click on the Workflow tab, you will be on the Worklist

Worklist is a "to do" list – work you see is sent to you because of the roles associated with your user id.

1. Open the Worklist on the home page, click **Worklist**.

   Note: Users with same roles will all receive the same work.

   Generally, work is sent to all users with a specific role. In specific cases, it is only sent to one person with that role.

   The status of the workitem will show as "Ready". The first person that starts the work will take it away from all the other users. This is called "reserving" the work. When the work is reserved or started, the workitem status shows as "Performing". To release the work back to all other users, there is a "release" option to change the status back to "Ready". Once the work has been completed by any one user in the role, Workflow marks the work as complete.

   The status will remain "Performing" until the user completes the work. Work that is performed entirely in Workflow is completed by clicking the "Complete" button within Workflow. Workflow work that opens Banner and requires data entry is completed by clicking the "Workflow Submit" button inside Banner after the work has been completed and saved.

   When the activity is complete the workflow goes to the next step.

Respond to Work

1. Click on the workitem on your worklist to start the activity.

2. Workflow will launch your work – open a workflow window, web page or launch Banner.

   a. For a workflow item – Complete your work as defined by the business process. When you have completed your work, click "Complete" to proceed to the next step. If you have not completed your work and wish to "reserve" it for later, click on the "Save and close" button.

   b. For a Banner item – Complete your work as defined by the business process. When you have completed your work, click the "Workflow Submit" button to submit your data. Banner should return to the main Banner form. If you have not completed your work but wish to "reserve" it for later, click the "Workflow Release" button. If you are not returned to Workflow, you can click the Workflow button on the Taskbar to bring Workflow to the front.

      i. Note: When workflow launches Banner, your Workflow logon ID and password will be used to log you onto Banner. Banner will automatically open for you, open the form you need to be on and populate the key information automatically.

3. In Workflow, if your worklist has not changed, click the *Worklist* option in the Home tab at the top of the navigation options on the left side of the window or use your browser refresh button.

Common User Workflow Questions

1. **What are the Workflow and Workflow Channels tabs in UNAPortal?**
    a. Workflow is an automation of a business process. Using Single Sign On (SSO), UNA has connected its Workflow Product with UNAPortal. This allows you to log into Workflow, complete tasks, review work, etc. without having to log in separately to another system. Workflow usernames and passwords are managed by UNAPortal, so there is no need to remember another password. The Workflow tab is a rendering of Workflow within UNAPortal. All activities of a Workflow process can be completed by using the Workflow tab within UNAPortal. The Workflow Channels tab is a rendering of specific pieces of Workflow broken out by type. The Workflow Channels tab allows you to see certain pieces of your Workflow environment individually without viewing Workflow in its entirety.
2. **I received an email regarding an item on my worklist – what do I do?**
    a. Work residing on a worklist is ready for you to complete. Log into UNAPortal and click on the Workflow tab to log into workflow. You should click on the workitem to launch work. The first column on the worklist indicates the Workflow name; the second column is the workflow step or activity name.
3. **I see work sitting on my worklist – what do I do?**
    a. Work residing on a worklist is ready for you to complete. You should click on the workitem to launch work. The first column on the worklist indicates the Workflow name; the second column is the workflow step or activity name.
4. **I see work on my worklist but it says it's still performing!!**
    a. The performing status in the first column of the worklist indicates that you started the work, but did not use the Workflow submit/complete button to indicate to Workflow that the workflow item has been completed. If a Banner activity is released in Banner, it will still be "Performing" on your worklist.
5. **I click on the worklist item that should go to a Banner form but Banner does not open!!**
    a. Check the Pop-up Blocker options on your desktop. Pop-ups should be disabled or Workflow should be added as an "Allowed" site.
6. **I hit workflow submit in Banner, but my work is still sitting there!**
    a. Click on your worklist link again or hit the browser refresh button to refresh their worklist. The worklist is dynamic. Once work is complete, the work will disappear from your Worklist when the browser is refreshed.
7. **I click on the worklist item and get an application error that says "An error has occurred. You must correct the following error(s) before proceeding. The work item is no longer available."!!**
    a. Another user completed the activity. This is not really an error.
8. **I hit Exit and left Banner before I hit Workflow submit – what do I do?**
    a. The work will still be waiting on your worklist. You need to start the work again to open Banner, do "Next Block" to populate fields, hit "Workflow Submit" to tell workflow the work is completed. (You should receive a pop-up warning message in Banner if you close the Banner form without using the "Workflow Submit" or "Release" buttons.)
9. **My work is gone – How do I know what happened!!**
    a. Workflow status search will have a record of all workflows that have started or have completed. Click on the Workflow Status Search option. Enter data that pertains to the specific workflow to filter the search. When the workflow names appear, click on the name to see the status. Click on the activity, and then click on the "Advanced" details button to see details of the particular step.